

## Module 7

# Employee Training and Development Using the Modern DCPDS

## Module Overview

### Purpose

Module Overview introduces you to Oracle Training Administration (OTA). You will access two applications to administer Employee Training and Development: (1) OTA for course and class management, and (2) Oracle Human Resources (HR) for employee information. These applications interact to allow an exchange of information between employee training records and the course management function. The OTA **Navigation List** allows you to access Oracle HR without changing responsibilities.



**Note:** This module is available for Nonappropriated Fund (NAF), National Guard Bureau (NGB), and Local National (LN) personnel.

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## Module Overview, Continued

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**Assumptions** In order to use OTA, you should have a basic understanding of:

- Oracle HR (People) Application
  - Federal Laws and regulations relating to training
  - DoD training policy, regulations, and processes
  - The OPM Training Policy Handbook
  - Requirements of your Component's training policy
- 

**Audience**

This module is written for	And contains information for
OTA users	<ul style="list-style-type: none"> <li>• Employees</li> <li>• Training Administrators and Personnelists</li> <li>• Training Resource Managers</li> <li>• Managers/Supervisors</li> <li>• Training Monitors/Coordinators</li> <li>• Personnel Generalists</li> <li>• OTA System Administrators</li> </ul>

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**Benefits of  
OTA**

- Central DoD Course Catalog
  - Bulletin Board with free text message
  - Simplified Training Request Form
  - System-generated DD Form 1556 and Continued Service Agreement
  - Combined Employee and Supervisor Course Completion Certification and Evaluation
  - Mass changes/course completions
  - Unlimited storage of training completions
  - 120-character fund cite
  - Class rosters (attendee lists)
  - Wait listing of nominees/alternates
  - Enrolling military and contract employees (external students)
- 

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## Module Overview, Continued

### Benefits of OTA (continued)

- Double-booking alerts
- Tracking estimated vs. actual costs
- Civilian Inbox application for routing and tracking training actions
- Relational database with Position and People in Oracle HR which precludes manual look ups and duplicate entries; e.g., merit selection criteria and course prerequisites
- Notifications to employees and supervisors generated by Civilian Inbox

### Oracle HR (People) and OTA

The majority of the work you will be conducting will be in OTA. You will be using Oracle HR to access the Special Information Type (SIT) such as Completed and Required Training, and Education, through the OTA Navigation List.

### Roles and Responsibilities

Defined roles and responsibilities are determined by each Component. OTA allows employees, managers/supervisors, training monitors and coordinators, and personnelists/administrators to request and process training. The roles and responsibilities within the training cycle may be performed by a number of people as determined by each Component, such as the Training Administrator within the HR office, or the organizational Training Monitor/Coordinator.

### Definitions


The following definitions show the standard roles for each responsibility. Components can customize these roles as necessary.

Role	Responsibility
OTA Personnelist	Complete access to all training processes and reports. Can be limited to specific functions or organizations depending on Component/local decision. (This is typically the trainer in the HR training office.)

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## Module Overview, Continued

### Definitions (continued)

Role	Responsibility
OTA Training Administrator	Complete access to all training processes and reports. Change the roles and responsibilities of users for OTA functions. (In addition to all OTA Personnelist responsibilities, this person will also have the ability to handle some systems administration work associated with OTA.)
OTA Manager or Supervisor	Complete access to all records and reports for their assigned employees. Access to the Bulletin Board and Evaluations. Capability of completing the Training Request Forms, printing DD Form 1556, and accessing the Enrollment Window. Also, allows access to Completed Training and Required Training areas in HR for assigned organization. Components may determine further restrictions as necessary. This role should also include military supervisors of civilian employees. 
OTA Organization Training Monitor	Access to training records and reports for their assigned organization. Access to the Bulletin Board and Evaluations. Capability of completing the Training Request Forms, Printing DD Form 1556, and accessing the Enrollment Window. Also, allows access to Completed Training and Required Training areas in HR for assigned organization. Components may determine further restrictions as necessary. This is the person in each organization who is responsible for handling and monitoring training.

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## Module Overview, Continued

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### Definitions (continued)

Role	Responsibility
Organization Training Coordinator	Access to training records and reports for their assigned unit within the organization. Access to the Bulletin Board and Evaluations. Capability of completing the Training Request Forms, Printing DD Forms 1556, and accessing the Enrollment Window. Also, allows access to Completed Training and Required Training areas in HR for assigned organization. Components may determine further restrictions as necessary.
OTA Employee	Access to their own training records, including Completed Training and Required Training. Access to the Bulletin Board and Employee Evaluation. Capability to complete the Training Request Form. This role is not available unless the employee has a User Id and Password which gives access to an Inbox.
OTA Fiscal Officer	Access to all cost information on individual, group, and total training costs. (This could be a resource manager in the organization or an individual in the accounting and finance office. More than one person could have this role). Does not have access to employee records.

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## Module Overview, Continued

### Roles and Responsibilities Screen Access

(Employee not included at this time)

<b>OTA Responsibility/Role</b>	<b>CIVDOD – OTA Trng Coor</b>	<b>CIVDOD – OTA Mngr/Supv</b>	<b>CIVDOD – OTA Org Trng Monitor</b>	<b>CIVDOD – OTA Fiscal Offcr</b>	<b>CIVDOD – OTA Personnelist</b>	<b>CIVDOD – OTA Trng Adm</b>
<b>OTA Menu Option</b>						
Training Requests	X	X	X	X	X	X
Training Request History Details	X	X	X	X	X	X
Enrollments	X		X		X	X
Activities	X				X	X
Events	X		X		X	X
Resources	X				X	X
Finance	Not Used	Not Used	Not Used	Not Used	Not Used	Not Used
Letters	X				X	X
Organizations (Supplier)	X				X	X
Setup						X
Enrollment Statuses						X
Category Usages						X
Skill Types						X
Look Up Codes						X
Activity_Category						X
Activity_Success_Criteria						X
Activity_User_Status						X
Booking_Source						X
Delegate_Failure_Reason						X
Dev_Event_Type						X
Enrollment_Status_Reason						X
Event_User_Status						X
Priority_Level						X
Professional_Credit_Type						X
Program_Membership_Group						X
Program_Membership_Role						X
Resource_Type						X
Resource_Usage_Reason						X
Trainer_Participation						X
Training_Center	X				X	X
Training_Unit						X
Customer and Supplier Setup					X	X
Enrollment Status Exclusions						X
Reports						
Manager Training Budget Report	X	X	X	X	X	X
Submit Course Evaluation to Emp						X
Submit One Time Event to Update						X
Training Request Form (DD1556)	X	X	X	X	X	X
Budget Cost Breakdown Report	X			X	X	X
Registration Report	X		X		X	X
Bulletin Board	Read Only	Read Only	Read Only	Read Only	X	X
Employee Course Evaluation	X	X	X		X	X
Manager Course Evaluation	X	X	X		X	X
Civilian In Box	X	X	X	X	X	X

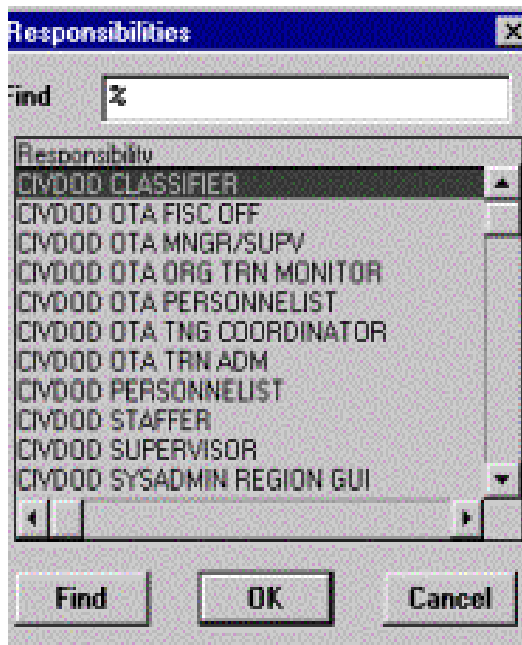
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## Module Overview, Continued

### Roles and Responsibilities Screen Access (Employee not included at this time)(continued)

<b>OTA Responsibility/Role</b>	<b>CIVDOD – OTA Trn Coord</b>	<b>CIVDOD – OTA Mngr/Supv</b>	<b>CIVDOD – OTA Org Trn Monitor</b>	<b>CIVDOD – OTA Fiscal Offcr</b>	<b>CIVDOD – OTA Personnelist</b>	<b>CIVDOD – OTA Trn Adm</b>
<b>ORACLE HR Menu Option</b>						
SIT - People/Completed Training	X	Assigned Emps	Assigned Org		X	X
SIT - People/Required Training	X	Assigned Emps	Assigned Org		X	X
SIT - People/Education	X	Assigned Emps	Assigned Org		X	X
SIT - View/Lists/Employees by SIT	X					
Completed Training	X	Assigned Emps	Assigned Org		X	X
Required Training	X	Assigned Emps	Assigned Org		X	X
Xtra Info - People/Training Program Req	X	Assigned Emps	Assigned Org		X	X
Federal Maintenance Forms						
- Routing Groups and Groupboxes						X
- Routing Lists						X

### Illustration The Responsibilities Window:



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## Module Overview, Continued

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<b>External User</b>	Users who are not currently part of the Oracle database (e.g., military, contractors) can be given access to Oracle HR and OTA to primarily perform supervisory duties. They can initiate a Training Request Form (TFR); complete a Manager Evaluation, and other tasks. These users are defined as “External Users.” Contact your Training Administrator or System Administrator to set up External Users or see Module 4, Chapter 2, Building External Users.
<b>OTA Secure User Views</b>	You must be assigned an OTA Secure User View by your System Administrator before you can see employee records based on the organization(s) you service or the position hierarchy. Additionally, you must have an OTA Secure User View to process OTA actions in your Civilian Inbox, initiate a Training Request Form, or request OTA Reports.
<b>Owned vs. Serviced Rule</b>	If you service personnel belonging to another agency, the rules of the owning agency will apply in Scheduling, Enrolling, and recording Completed Training. ◆ <b>Example:</b> If Navy services an Air Force employee, Air Force rules will apply.
<b>External Students</b>	External students can be built for the sole purpose of enrollment and will normally be anyone not on your database such as military personnel, contractor personnel, or employees from another region or Component. They will be space holders on course rosters but you cannot document completion on their records. See Chapter 3 of this module, Building and Enrolling External Students, for more information.

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## Module Overview, Continued

### Education Information

Employee education data may be accessed to check for course prerequisites, tuition assistance, and for other reasons. To access Education data for an employee:

**Navigation List** → **SIT** → **<Open>**. The **Find Person** Window displays. Query for the employee. The **People** Window displays. Click **<Special Information>**. The **Special Information** Window displays. Scroll to Education and click the **Details** data field for specific information (or click [F7], type Education, and click [F8]). If the Information Exists Checkbox does not have “X”, there is no data in the Descriptive Flexfield.

◆ **Example:**

The screenshot shows a window titled "Education" with a toolbar containing a list icon, a down arrow, and a question mark. The window contains the following fields and values:

Education Level	17	Master's degree
Instructional Program	010501	Agricultural Supplies Retailing
Year Degree / Cert Attained	1984	
Credit Hours		
Credit Type		
Type of School	C	College or University
College-Major-Minor	1	Major Field of Study
Academic Institution Name	TEG	TEX A&M U TX (TEG)
Coop Graduation Date		

At the bottom of the window are three buttons: Clear, Cancel, and OK.

Completed Training and Required Training are also found under **<Special Information>**.



**Note:** Managers/supervisors, Training Coordinators, and Training Monitors have “read only” access to employee education.

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## Module Overview, Continued

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### Training Program Requirements

Training Program Requirements (e.g., Supervisory Course Completed, Special Program Identifier, Date Training Obligation Expires, and other programs) are found under **<Extra Information>**. To access this data for an employee:

**Navigation List** → *People* → *Enter and Maintain* → **<Open>**. The Find Person Window displays. Click **<Extra Information>**. Scroll to **Training Program Requirements** or query for it and click the **Details** data field for specific information.

The screenshot shows a window titled "Extra Person Information" with a list of fields for training program requirements. The fields are: Supervisory Course Completed, Special Program Identifier, Date Trng Obligation Expires (with a mouse cursor pointing to it), Target Occ Series, Date Journeymen Elig(NV), Entry Step Apprentice(AF), Lifeboat Certification(NV), Dt Nucl/Biomed/Chem Completed, and Coop Funding Source. Each field has a corresponding input box. At the bottom of the window are three buttons: Clear, Cancel, and OK.

### Continued Service Agreement

The Continued Service Agreement (**CSA**) is generated along with the DD Form 1556 when printed. Follow your Component's policy for completion. The date it expires is entered in the People Record → **<Extra Information>** → *Training Program Requirements* → *Date Training Obligation Expires*, as illustrated above.

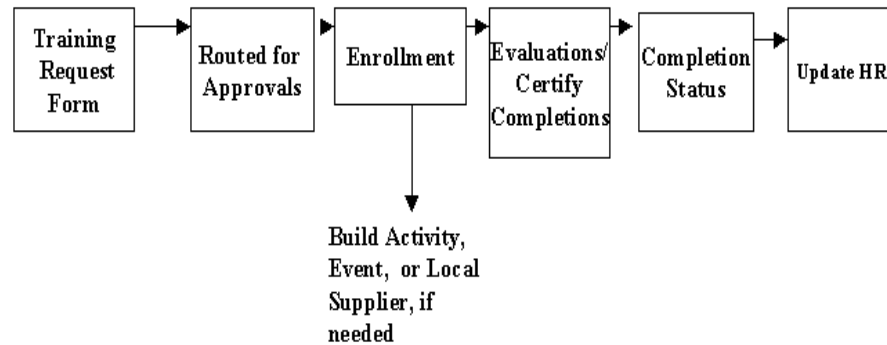
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## Module Overview, Continued

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**OTA Workflow** The sequence from the initial request to the enrollment:



### OTA and Oracle HR Interface

You will access two applications to administer Employee Training and Development: (1) OTA for course and class management, and (2) Oracle Human Resources (HR) for employee information. These applications interact to allow an exchange of information between employee training records and the course management function.

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## Module Overview, Continued

### Querying OTA Windows


Use one of the following methods to query OTA windows:

1. On any OTA Window, with the cursor in the data field needed, press **[F7]** and enter the parameter, then press **[F8]**.  
*Or*
2. On any OTA Window, with the cursor in the data field needed, click **Query** on the Main Menu Bar and click **Enter**. Enter the parameter you wish to query (e.g., course title, date, center, etc.). Click **Run** on the Main Menu Bar under **Query**.

#### ◆ Example:

### Exiting OTA Windows

You can close or exit each window by one of the methods described below:

1. The fastest method is to click the "X" in the upper right-hand corner of each window.
2. Double click the small Oracle symbol/box to the left of the window name.  

3. On the Main Menu Bar, click **Action** and then click **Close Window** to close the top window and display the next window needed.
4. On the Main Menu Bar click **Action** and then click **Close Form** to close the window and return to the **Navigation List**.
5. Press **[Ctrl] + [F4]**.

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## Module Overview, Continued

### Terms

Term	Definition
Activity (course)	Defines the courses listed in the central DoD Course Catalog along with what a supplier can offer. Local Suppliers can be built for local activities.
Activity, Local	Using one of the nine OPM Training Types, build a local activity to accommodate local training needs not included in the DoD Course Catalog.
Activity Type	One of the nine OPM Training Types expanded to include functional areas within DoD; e.g., Acquisition.
Address	Students' external (home) mailing address or internal (work) mailing address.
AFTMS	Air Force Training Management System. A system used for managing quotas at DoD service schools.
Agency Group	The Component that the employee belongs to.
Billing UIC	Unit Identification Code. Use determined by Component.
Booking Priorities	Defined by DoD to include 1) Critical/Mandated, 2) Essential, and 3) Recommended.
Bulletin Board	Used on-line to advertise upcoming events, provide instructions, course criteria, suspense dates, and surveys.
Center	The location for the Event.
Category	A group of activities (courses) that you want to schedule and administer as a program, or classify for reporting purposes. When a category is defined, you can specify it to be used as a program.
Civilian Inbox	A system folder that displays OTA notifications initiated by you or routed to you.
Civilian Servicing Unit	An application you can access through your desktop to retrieve personnel data.
Clashing Events	Double-booking or Double-scheduling for two Events at the same time.

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## Module Overview, Continued

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### Terms (continued)

Term	Definition
Class	See Scheduled Event.
Completed Training	Training completed either on or off-duty.
Continued Service Agreement (CSA)	Requires an employee selected for training to agree in writing <i>before</i> assignment to training to continue in federal service based on OPM and component policy.
Customer	Employee.
Delegate	A student.
Double Booking	Being scheduled for two events at the same time.
Direct Cost	Tuition, books, and other fees to exclude travel costs.
Enrollment	Using the <b>Enrollment</b> Window, the actual process of placing an employee against a class space.
Event	A specific instance (class) of an Activity, scheduled to run on given dates, or a one-time event which is not related to an Activity.
Event Status	Cancelled, Closed, Full, Normal, or Planned.
External Students	Personnel outside the database you may need to enroll in an Event.
Extra Information	Categories of information that reside on the People record such as Special Training Requirements. Only one entry per category can be input, such as TSP vs. a SIT where multiples can be input.
Indirect Cost	Travel costs to include travel and per diem.
Individual Development Plan (IDP)	Required Training information extracted from employee's record in HR.
Method	Seminar, Classroom, Multi-media, and other.
Notifications	Notices in the Civilian Inbox that describes the nature of the actions (e.g., training request awaiting approval).
One-Time Event	Any Event for which you want to record basic information and enrollments, but which you do not need to define as an Activity. One-Time Events do not generate course evaluations or DD Forms 1556.

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## Module Overview, Continued

### Terms (continued)

Term	Definition
Program	A group of Events scheduled together. See Category.
QuickCode Types	Categories of information, such as enrollment status, that have a limited list of valid values. You can add values to some QuickCode types. Also called Local Codes.
Receive for Quotations (RFQ)	A site for receiving supplier quotations. Not used by DoD.
Reports	Used for standard reports, extracting the DD Form 1556, the Training Request Form, and Ad Hoc Reports.
Required Training	Mandated by law, Executive Order, DoD, Component, installation, etc.
Responsibility	Each responsibility lets you access a specific set of OTA forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.
Resource	Any facility, person, or equipment needed to run an Event. Two special resource types in OTA are trainers and locations (venues).
Restricted Event	A scheduled Event in which only selected employees can enroll. You can select valid employees by organization, job, or position.
SAID	Subject Area Identifier – two digit prefix used to identify training by Army/Navy.
Set of Books	Not used by DoD.
Scheduled Event	A specific instance (class) of an Activity on which students can enroll and for which you can book resources.
Session	A unit of time within an Event for which you can independently book resources. Example: You might divide a one-day Event into four two-hour sessions.
Standard Industry Code (SIC)	Used by the State Unemployment Offices to classify companies by the type of business they do. Used in building a Supplier. Not used by DoD.

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## Module Overview, Continued

### Terms (continued)

Term	Description
Status (Enrollment)	Used with employee booking status types; e.g., requested, completed, waitlisted, cancelled, or placed.
Status (Event)	See Event Status.
Special Program Identifier	Identifies special programs such as VRA, DLAMP, apprentice, and others.
Special Information Types (SIT)	Categories of personal information that reside on the People record of Oracle HR such as Completed or Required Training, and Education where multiple occurrences can be input.
Supplier	Vendor/instructor (internal or external) who provides the training.
Training Request Form (TRF)	Used to request training and forward through Civilian Inbox to approving offices. It contains part of the information that will system-generate a DD Form 1556, if required.
Training Source	Government, College/University, Other DoD, etc.
Type	A five -digit code used by Army, Navy, and Air Force for delineating their training types.
Venue	Location of the Event.
Wait listed	Waiting for a space in a class or students identified as alternates.

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## Module Overview, Continued

### Business Rules

The business rules unique to OTA are:

- Before enrolling an employee in an Event (class), it may be necessary to build a local supplier. Next, an Activity (extract information from the DoD Course Catalog) or a local Activity coordinated through your Component must be defined and an Event set up for the Activity.
- Evaluations must be completed before the completed training is updated in HR, unless the One-Time Event is used.
- A course completion certification and evaluation will electronically flow through OTA to the employee for certification or verification of completion. After the employee certifies and evaluates, OTA electronically flows the manager's certification/evaluation to the supervisor or training monitor.
- The supervisor or training monitor will need to complete the certification.
- The system will update the modern DCPDS database in Oracle HR (completed training history) if Enrollment Status is equal to 'COMPLETE'. If not, the supervisor, training monitor or designated person will need to manually update enrollment status.

### Stages of the Training Cycle

Using OTA and Oracle HR, the main stages in the training cycle are as follows:

Stage	Description	Application
1	<b>Identifying Training Needs</b> – Nominate students and request training.	OTA or HR Required Training (Special Information Type)
2	<b>Approving Training</b> – Approve training to be conducted by approving Training Request Forms (TRF), scheduling Activities (courses), booking resources, and enrolling students: <ul style="list-style-type: none"> <li>• Send TRFs through approval levels.</li> <li>• Schedule Events with dates for your training Activities.</li> <li>• Book the resources for your training Activity.</li> <li>• Enroll nominees on Events.</li> </ul>	OTA

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## Module Overview, Continued

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### Stages of the Training Cycle (continued)

Stage	Description	Application
3	<b>Managing Training</b> - Manage enrollments, cancellations, attendance and completions: <ul style="list-style-type: none"> <li>• Handle enrollments through stages:               <ul style="list-style-type: none"> <li>• Nominations</li> <li>• Waiting Lists</li> <li>• Confirmations</li> <li>• Cancellations</li> <li>• Standard letters as required</li> <li>• Actual expenses tracked</li> </ul> </li> <li>• Completed training updated.</li> </ul>	OTA  Oracle HR – People (Special Information Type)
4	<b>Evaluating Training</b> - Evaluate activities and produce reports: <ul style="list-style-type: none"> <li>• To assess effectiveness with supervisor and employee input.</li> <li>• To compare estimated costs with actual costs.</li> <li>• To assess suppliers/vendors.</li> </ul>	OTA

---

**Course Catalog** OTA uses an on-line course catalog for auto-populating Activity (course) data fields. The catalog consists of DoD centrally maintained and local (region-specific) activities.

- Each Regional Service Center is responsible for building and maintaining its local activities.
- Access to the catalog is through the TRF and **Activity** window.
- Each activity should have an OPM Training Type Code for standardized reporting purposes.
- Completed Training (See Chapter 4 in this module) outside the OTA process, does not require an OPM Training Type Code.

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*Continued on next page*

## Module Overview, Continued

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### Course Catalog (continued)

- The catalog contains data (when provided by the supplier) that are used to update the **Activity** Window and populates the TRF.
- The following data items populate on the TRF and/or the DD Form 1556 when the **Activity** Window is completed:

Data Field
• Activity Type (includes OPM Training Type Codes)
• Type Description
• Supplier
• Course Hours
• Activity Name (Course Title)
• Objectives
• Supplier
• Cost (Tuition Only)

---

*Continued on next page*

## Module Overview, Continued

**Bulletin Board** An on-line bulletin board can be viewed by training managers for surveys, to advertise upcoming course announcements, provide instructions, course criteria, and suspense dates.

### Illustration

**Privacy Act of 1974**

Action Edit Query Go Folder Special Help Window

**Bulletin Board**

Post Date	Title	Expiration Date
30-JUL-1998	Mind Mapping	01-SEP-1998

**Text**

Mind Mapping will teach you to listen and record information more effectively in briefings, classes, and conferences.  
 Event is open to all personnel at no cost.  
 Event size =20 | Nomination Deadline = 1 Sep 1998  
 Dates: 1-2 Oct 1998  
 Event Length = 16 hours | PC - Dr Paula Adamson

*Continued on next page*

## Module Overview, Continued

### OPM Course Training Type Codes

OPM Course Training Type Codes with expanded functional codes will be used within the course catalog.

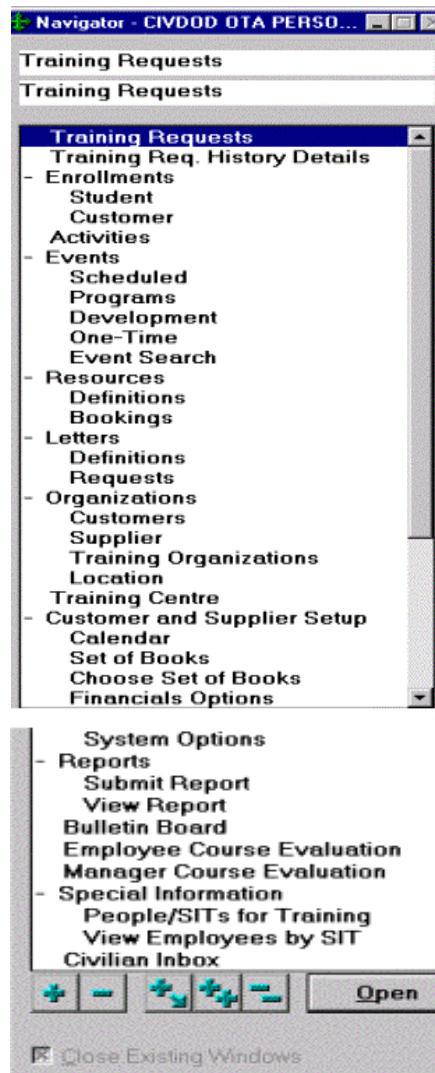
Type	Definition
<b>1-A</b>	Executive
<b>1-B</b>	Management
<b>2-C</b>	Supervisory
<b>2-W</b>	Recurring
<b>3-E</b>	Legal
<b>3-F</b>	Medical
<b>3-G</b>	Scientific
<b>3-H</b>	Engineering
<b>3-I</b>	Other Professional
<b>4-J</b>	Administration and Analysis (Public/Business Administration, Personnel Training, EEO, Logistics, Finance, Systems Analysis, Policy, Program or Management Analysis, or Planning)
<b>5-D</b>	Spec/Tech (Acquisition)
<b>5-N</b>	Spec/Tech (Human Resources, Safety, History, Community Planning)
<b>5-O</b>	Spec/Tech (Accounting, Financial Management, Computer Operations/Sciences, Agriculture, Radio Operations, Navigation.)
<b>5-P</b>	Spec/Tech (Tech Writing, Librarian, Pavement Maintenance, Project Management)
<b>5-Q</b>	Spec/Tech (Supply, Procurement, Transportation, Inventory Management, Vehicle, TQM)
<b>6-K</b>	Clerical
<b>7-R</b>	Trades/Crafts (Electrical, Digital)
<b>7-S</b>	Trades/Crafts (Aircraft, Auto, elevator, Hydraulics, Ship, Mechanics, Locksmithing, Equipment)
<b>7-T</b>	Trades/Crafts (Photography, X-Ray, radiology)
<b>8-L</b>	Orientation
<b>9-M</b>	Adult Education

*Continued on next page*

## Module Overview, Continued

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- Navigation List** The following OTA functions will not be available to all users. Functions are available based on assigned responsibilities.
- ◆ Example of Menu for CIVDOD OTA Personnelist:



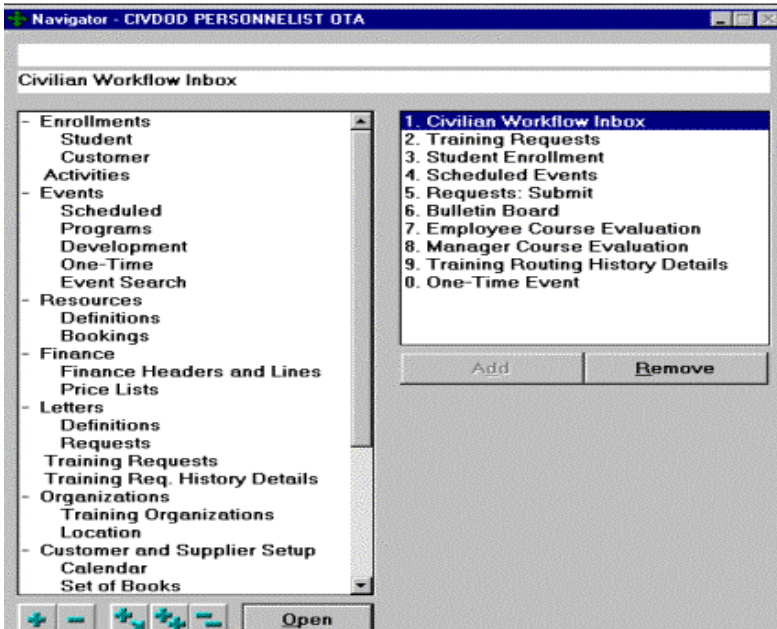


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## Module Overview, Continued

### Setting up Your Top-Ten on the Navigation List

For quick access to frequently used windows, you can create a Top-Ten List on the right side of the **Navigation List**. To create one, follow the instructions in Module 1, Fundamentals of the Modern DCPDS, Chapter 2, Logging On and Access or use the following steps:

Step	Action
1	Click a frequently used menu item.
2	Click <Add>. The Navigation Menu item displays in the Navigation Top-Ten List, with a number beside it.
3	<p>Repeat Steps 1 and 2 for any other frequently used items to add to your list (up to ten items).</p> <p>◆ <b>Example:</b></p>  <p> <b>Note:</b> To open an item from your Top-Ten List, press the number (not function key) on your keyboard for the selection you need, or click the item.</p>

*Continued on next page*

## Module Overview, Continued

### Training Request Form

The **Training Request Form (TRF)** is a simplified method used to request training in OTA. Employees, supervisors, training monitors, or training managers can complete the one-page window. By clicking the List Of Values (LOVs) for basic employee data, course title, source, location, and priority, the form is completed and can be forwarded electronically to the next approving level. For information, see Chapter 1, Requesting Training, Section, Completing the Training Request Form, in this module.



**Note:** A completed DD Form 1556 can be printed after the TRF and enrollment are completed. You can also print a partially complete DD Form 1556 anytime during the nomination process.

### Illustration

#### The Training Request Form:

*Continued on next page*

## Module Overview, Continued

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**Supplier** A supplier is the vendor for an Activity or Event. The supplier may be located in the DoD Course Catalog or you may need to build a local supplier for a local activity. (See Chapter 2 of this module).

---

**Illustration** The **Suppliers** Window:

The screenshot shows a window titled "Suppliers (CIVDODHR)". The form contains the following fields and controls:

- Supplier Name: [Text Field]
- Number: [Text Field]
- Taxpayer ID: [Text Field]
- Tax Registration Number: [Text Field]
- Inactive After: [Text Field]
- [ ] [ ] (Small input fields)
- Classification: [Dropdown Menu]
- Type: [Text Field]
- Employee Name: [Text Field]
- Number: [Text Field]
- ☐ One Time
- SIC: [Text Field]
- Minority Owned: [Text Field]
- ☐ Small Business
- ☐ Woman Owned

### Credit Card Data



**Note:** The current modern DCPDS Client Server Version (Version 10.7) does not have the necessary security level required to accommodate credit card numbers. Once DoD migrates to Version 11i, web-based, the capability will exist. Users should not enter credit card data with the current version.

## Module Overview, Continued

**Activity** Defining an Activity is the first step in the sequence of setting up training. Many Activities will be located in the DoD Course Catalog. Procedures for Defining an Activity are found in Chapter 2 of this module.

**Illustration** The **Activities** Window:

The screenshot shows a software window titled "Activities". It contains several input fields and checkboxes for defining an activity. At the top, there are fields for "Activity Type" and "Description", with a checked checkbox for "Concurrent Activities". Below this is a section titled "Activity" with fields for "Name", "Description", "Audience", "Objectives", "Supplier", "Language", and "Next Activity". To the right of these fields is a "Valid Dates" section with "From" and "To" date pickers. Below the "Activity" section are four sub-sections: "Students" (with "Maximum", "Minimum", and "Max Internal" fields), "Costs" (with "Currency", "Budget", and "Actual" fields), "Duration" (with "Length" and "Units" fields), and "Professional Credits" (with "Type" and "Amount" fields). There are also checkboxes for "Allow Expenses" and "Success Criteria". At the bottom of the window are four buttons: "Skills", "Categories", "Resources", and "Copy Objects".

*Continued on next page*

## Module Overview, Continued

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**Scheduled Event**      The second step in the sequence of setting up training is scheduling the Event. Procedures for Scheduling an Event are found in Chapter 2 of this module.

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**Illustration**      The **Scheduled Event** Window:

The screenshot shows the 'Scheduled Event' window with the following sections:

- Title:** [Text Field]
- Activity:** [Text Field]
- Center:** [Text Field]
- From:** [Text Field]
- To:** [Text Field]
- Duration:** [Text Field]
- Units:** [Dropdown Menu, currently set to 'Day']
- Secure:** ☐
- Resource bookings:** ☐
- Program Only:** ☐
- Administration:**
  - Supplier:** [Text Field]
  - Sponsor:** [Text Field]
  - Status:** [Text Field, currently set to 'Normal']
  - User Status:** [Text Field]
  - Language:** [Text Field]
- Enrollment:**
  - Start:** [Text Field, currently set to '11-DEC-1998']
  - End:** [Text Field]
  - Restricted:** ☐
- Students:**
  - Minimum:** [Text Field]
  - Maximum:** [Text Field]
  - Internal:** [Text Field]
- Cost:**
  - Currency:** [Text Field]
  - Budget:** [Text Field]
  - Actual:** [Text Field]
- Price:**
  - Basis:** [Dropdown Menu, currently set to 'Student']
  - Currency:** [Text Field, currently set to 'USD']
  - Amount:** [Text Field]
  - Invoiced:** [Text Field]

At the bottom, there are four buttons: **Change Status**, **Assignments**, **Categories**, and **Sessions**.

---

**DD Form 1556**      The DD Form 1556 is **not** the method for requesting training in OTA.

- It is an output form that can be printed when needed for written or official documentation.
- OTA will begin auto-populating it as you complete the steps for processing the **Training Request Form**. It is further populated as you complete other windows.
- The DD Form 1556 may be viewed and printed at each level in the approval process but will print only those portions that have been completed up to that point.

*Continued on next page*

# Module Overview, Continued

## DD Form 1556

REQUEST, AUTHORIZATION, AGREEMENT, CERTIFICATION OF TRAINING AND REIMBURSEMENT									
A. Agency endorsement (statement, and identifying office number (include unit))		B. Standard document number (3 digit Office PM, DocType code/ Serial number)		C. Request Status in Previous Cycle (if any)		D. Amendment (No.)			
				<input checked="" type="checkbox"/> (1) Initial <input type="checkbox"/> (2) Reinitiation <input type="checkbox"/> (3) Cancellation <input type="checkbox"/> (4) Case deletion					
<b>Section A - TRAINEE / APPLICANT INFORMATION</b>									
1. Name (Last, First, Middle Initial) RANERI, PAMELA J.		2. Initials of last name RANERI		3. Social Security Number		4. Ed level		5. Continuation Period (in months)	
6. Home Address (Street, City, State, and ZIP Code) (optional)		7. Phone Number (include area code)		8. Position Title CONTRACT OVERSIGHT SPECIALIST					
		a. Home		b. Position Level (if any)					
		c. Office		9. Pay Plan / Salary Grade / Step (Pay Plan / MOS / AFSC / or Navy Designator) GS-0301 - GS-0309					
10. Organization Name AF RESEARCH LAB AF1MEB1MFB6R01		(1) Contract		a. Executive					
		(2) Assignment		b. Manager					
11. Organization Mailing Address (include ZIP) Edwards AFB Fort		12. Organization USE FORMER		c. Supervisor		13. Type of Appointment 1A			
		14. Are you being appointed or reassigned? (If yes, mark)		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		15. No prior non-assignment training days			
<b>Section B - TRAINING COURSE DATA</b>									
17. Course Title JAN'S TEST									
18. Training Objective (Benefits to be derived by the Government)									
19. Recommended Training Source, School or Facility									
a. Name ITEC									
b. Mailing Address (include ZIP)									
20. Course Codes									
a. Location of Training site (if other than 100)									
a. Purpose									
b. Type									
c. Source									
d. Special Instruction									
e. Training Venue									
f. Security Clearance									
g. Alternative Sites									
h. Priority									
i. Training Level									
j. Method of Training									
k. Reason for Selection									
l. Training Period (Y/M/D)									
m. Date									
n. Complete									
o. City									
p. State									
q. Non-City									
r. Total									
s. Other (Specify)									
<b>Section C - COST INFORMATION (Costs incurred and billed are not to exceed amount in item 30.)</b>									
24. If training does not involve expenditure of funds other than salary, pay or compensation, skip the remainder of questions in Section C and X this box									
25. Direct Cost									
26. Indirect Costs (For information only)									
27. Accounting Classification									
a. Salary Costs \$									
b. Books, materials, other costs \$									
c. Total direct costs \$ 0									
d. Total indirect costs \$ 0									
e. Funding source									
f. Letter Code									
g. Signature of Fiscal Officer (Follower level personnel)									
h. Total of Direct & Indirect Costs \$ 0									
<b>Section D - APPROVAL / CONCURRENCE / CERTIFICATION</b>									
32. SUPERVISOR (I certify training is job related and conforms to applicable regulations. (If not, attach notes.))									
33. Training Office (I certify this training meets regulatory requirements.)									
a. Typed Name (Last, First, Middle Initial)									
b. Phone number (include area code)									
c. Signature & Title									
d. Date									
e. Signature & Title									
f. Date									
34. Approving Official									
35. Course Acceptance (To be completed by school official)									
a. Accepted									
b. Not Accepted									
36. Course Completion (To be completed by school official)									
a. If course was not completed, X this box, leave this section blank, and attach this form with an explanation reason.									
b. Actual Completion Date (Y/M/D)									
c. Grade									
37. Billing notations (Identify discount items. Furnish original invoices and 3 copies to)									
a. Signature & Title									
b. Date									
38. Certifying Government Official									
a. I certify that this account is correct and proper for payment in the amount of \$									
b. Signature									
c. Date Signed									
d. Official Name									
e. Check Number									
f. Your Name									

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## Module Overview, Continued

### DD Form 1556 Crosswalk

All the elements required by OPM are included on the DD Form 1556 and are annotated with an asterisk. The following blocks of the DD Form 1556 are populated from the indicated windows and data elements:

DD1556 Block	OTA Window	DDF	Data Element
A. Agency Code	Enrollment Details	X	Agency Code
B. Std Document #			
C. Request Status or Process Code	Defaults to initial request		
D. Amendment #			
1. Name	Training Request Form (TRF)		Name
2. 1 <sup>st</sup> 5 letters	TRF (from HR)		
3. SSN	TRF		SSAN
4. Ed. Level	Not Required		
5. Continuous Federal Service	Not Required		
6. Home Address	Not Required		
7. Phone Numbers	Not Required		
8. Position Title	TRF (from HR)		Title
9. Position Level	TRF (from HR)		
10. Pay Plan/Series /Grade/Step	TRF (from HR)		Plan/Series/Step/Grade
11. Organization Name	TRF (from HR)		Organization
12. Organization Mailing Address	(from HR)		
13. Organization UIC	(from HR)		
14. Type of Appt.	TRF (from HR)		Type of Appointment
15. No. prior non-govt training days	Not Required		
16. Handicapped	TRF (from HR)		Handicapped
17. Course Title *	TRF (from Activity)		Title

*Continued on next page*

## Module Overview, Continued

### DD Form 1556 Crosswalk (continued)

DD1556 Block	OTA Window	DDF	Data Element
18. Training Objectives	Activity		Objectives
19a. Recommended Training Source, School or by Facility Name	Activity		Supplier Name
b. Mailing address	Activity		Supplier/Site Address
c. Location	TRF		Location
20. Course Codes:			
a. Purpose *	Enrollment Details	X	Purpose
b. Type *	TRF		Course Code
c. Source *	TRF		Source
d. Special Interest	Not Required		
e. Training Vendor*	Activities		Supplier
f. Security Clearance	Activities	X	Required Security Clearance
g. Allocation Status			
h. Priority	Enrollment Details	X	Priority
i. Training Level			
j. Method of Training *	Scheduled Event	X	Method
k. Training Program			
l. Reason for Selection	Enrollment Details	X	Purpose
23. Training Period			
a. Start *	Scheduled Event	X	Start Date
b. Complete *	Scheduled Event	X	End Date
21. Course hours			
a. Duty *	Enrollment Details	X	Training On-Duty Hours
b. Non-Duty *	Enrollment Details	X	Training Non-Duty Hours

*Continued on next page*

## Module Overview, Continued

### DD Form 1556 Crosswalk (continued)

DD1556 Block	OTA Window	DDF	Data Element
c. Total*	Enrollment Detail	X	Training Hours
22. Course Identifiers			
a. SAID			
b. Catalog/Course No*			
c. Offering/TLN			
24. Statement relating to non-expenditure of funds.	N/A	N/A	N/A
25. Direct Cost	Scheduled Event	X	
a. Tuition Costs	Scheduled Event		Tuition Per Student
b. Books, other costs	Scheduled Event		Books/Material/Other Fees
c. Total direct costs	Scheduled Event		Total Direct Cost
d. Funding source	Scheduled Event		
26 Indirect Costs	Scheduled Event		
a. Travel cost	Enrollment Details	X	Travel Cost
b. PD/other costs	Enrollment Details	X	Per Diem or PCS Cost
c. Total indirect costs	Enrollment Details	X	Total Indiv Direct Cost
27. Accounting Classification	Enrollment Details	X	Accounting Classification NBR
28. Labor Costs			
30. Total Direct & Indirect Costs	Enrollment Details	X	Total Individual Cost
31. Job Order No.			
32. Supervisor	TRF		Level

## Module Overview, Continued

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### DD Form 1556 Crosswalk (continued)

DD1556 Block	OTA Window	DDF	Data Element
33. Training Officer	TRF		Level
34. Authorizing Official	TRF Enrollment Details		Authorized Checkbox
35. Course Acceptance	Enrollment Details		Status
36. Course Completion	Completion Certification (Eval)		
37. Billing Instructions	Scheduled Event	X	Billing Organization
38. Certifying Govt Official			

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*Continued on next page*

## Module Overview, Continued

### Individual Development Plan

The **IDP** information can be extracted from the **Required Training** data fields in Oracle HR (People Special Information) using your Component's query tools. A formatted IDP is under development.

### Civilian Inbox

OTA uses the Civilian Inbox to display notifications initiated by you or routed to you.

- Training Request Forms and other actions are stored and routed through the Civilian Inbox for approval or required follow-on action.
- See Chapter 1, Requesting Training, Accessing the Civilian Inbox, in this module and Module 1, Fundamentals of the Modern DCPDS, Chapter 7, Folders.



**Note:** Separate folders can be established for OTA actions versus Request for Personnel Actions (RPAs). However, to process a Training Request, you must be in a role with OTA responsibility.

### Illustration

A Civilian Inbox Notifications Window:

Priority	Due Date	To	Subject	Comment
50		Paula Adamson	Notify CPO Update Required Training	
50		Paula Adamson	Notify CPO Update Required Training	
50		Paula Adamson	Notify CPO Update Required Training	
50		Paula Adamson	Training Request is Approved	
50		Paula Adamson	Training Request is Approved	
50		Paula Adamson	Training Request Awaiting Approval	

Message  
The follow required training has been approved and needs to be updated:  
Employee Name: Malmo, Tana M

Close Open

*Continued on next page*

## Module Overview, Continued

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<b>Letters</b>	<p>Standard letters can be generated using Oracle Reports or Microsoft Word application to document each stage of Event and Enrollment administration.</p> <p>◆ <b>Examples:</b></p> <ul style="list-style-type: none"> <li>• Notification of enrollment</li> <li>• Class cancellations</li> </ul> <p>Generation of letters requires a program, such as SQL Plus script, to extract the data.</p>
<b>Reports and Career Briefs</b>	<p>All training related career briefs and reports are available through Reports as discussed in Chapter 6. Additionally, managers and training coordinators may access specific budget reports on their employees. The Civilian Servicing Unit (CSU) can also be accessed to retrieve Employee Training History and career briefs on Education, Acquisition, and others.</p>
<b>Course Evaluation/Certification</b>	<p>Employee and Manager Course Evaluation/Certification will flow to the TFR originator on the graduation date of the Activity (course), who completes the form, and then forwards it to the Supervisor for completion (by means of the Civilian Inbox). See Chapter 4, Training Completions and Evaluations, in this module for procedures and information.</p>

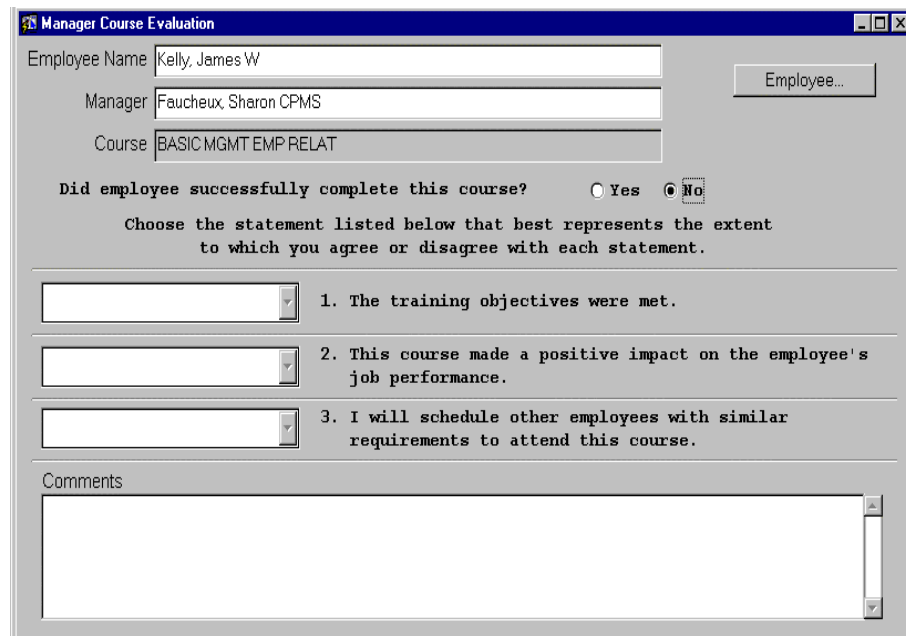
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## Module Overview, Continued

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### Illustration      The Manager Course Evaluation Window:



The screenshot shows a Windows-style application window titled "Manager Course Evaluation". It contains several input fields and a list of statements for evaluation.

Employee Name: Kelly, James W  
Manager: Fauchoux, Sharon CPMS  
Course: BASIC MGMT EMP RELAT

Did employee successfully complete this course? ☐ Yes ☒ No

Choose the statement listed below that best represents the extent to which you agree or disagree with each statement.

1. The training objectives were met.  
2. This course made a positive impact on the employee's job performance.  
3. I will schedule other employees with similar requirements to attend this course.

Comments

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*Continued on next page*

## Module Overview, Continued

### Illustration      The Employee Course Evaluation Window:

**Employee Course Evaluation**  
**Employee Certificate of Completion**

Employee Name: Kelly, James W.  
 Course Title: BASIC MGMT EMP RELAT  
 Start Date: 08 NOV 1999      End Date: 12 NOV 1999  
 Supervisor: Fauchoux, Sharon CPMS

Did you successfully complete this course? ☒ Yes    ☐ No

If yes, what grade did you receive?

☒ Satisfactory      ☐ CEU:   
☐ Passed      ☐ Semester:   
☐ Numeric Score:       ☐ Quarter:   
☐ Letter Grade:       ☐ None

Choose the statement listed below that best represents the extent to which you agree or disagree with each statement.

3 = Neither Agree Nor Disagree

1. The description of the course adequately described the skills to be covered in the training section. (If description was not provided, answer "3" neither agree nor disagree).

2. Course adequately covered the subject matter and supported learning objectives.

3. Handouts, visual aids, and other materials enhanced the instructional process.

4. The level of difficulty of the course content was appropriate. (Please comment if you disagree or strongly agree.)

5. The instructor was effective:  
 - Demonstrated a thorough knowledge of the course content;  
 - Made good use of classroom time;  
 - Directed group instruction effectively.

6. The course contributed to my knowledges/skills and my objectives for taking this course were adequately met.

7. Overall, the facilities were adequate for training purposes.

8. I would recommend this course to my colleagues.

Comments

*Continued on next page*

## Module Overview, Continued

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**Navigation List** The OTA **Navigation List** with Associated Windows and Topics:

Navigation List	Associated Window(s)	Procedure Steps by Topic
Training Requests	Training Requests	Completing the Training Request Form
Training Req: History Details	Training Request - Routing History	Training Request Form Routing History
<b>Enrollments:</b>		
Student	Search for Event Enrollment Summary Enrollment Details	Enrolling an Employee Building and Enrolling External Students
Customer	Customers for Restricted Events	
<b>Activities</b>	Activities	Defining an Activity
<b>Events:</b>		
Scheduled	Scheduled Event	Scheduling an Event/Session Canceling an Enrollment
Programs	Programs	
Development	Development Events	
One-Time	One-Time Event	Creating a One-Time Event
Event Search	Search for Event	
<b>Resources:</b>		
Definitions	Resource	Building and Booking Resources
Bookings	Search for Event Book Resources	
<b>Letters:</b>		
Definitions	Letter	Defining a Standard Letter
Requests	Request Letter	Submitting an Automatic Letter Request
<b>Organizations:</b>		
Customers	Customers	
Supplier	Suppliers Summary Suppliers	Creating a Local Supplier
Training Organizations	Organization	Not currently used by DoD
Location	Location	

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## Module Overview, Continued

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### Navigation List (continued)

Navigation List	Associated Window(s)	Procedure Steps by Topic
<b>Setup:</b>		
Enrollment Statuses	Define Enrollment Training Status	
Category Usage	Define Category Usage	
Skill Types	Special Information Types	
Lookup Codes	Quick Codes	Setting Up Local Codes
Personal Profile Options	Personal Profile Options	
Enrollment Status Exclusions	Define Enrollment Status Exclusions	
<b>Customer &amp; Supplier Setup:</b>		
Calendar	Accounting Calendar	
Set of Books	Set of Books	
Choose Set of Books	Set of Books	
Financials Options	Financials Options	
System Options	System Options	
<b>Reports:</b>		
Submit Report	Submit Requests	Printing a DD Form 1556 Printing a Student Course Eval
View Report	Completed Requests	Viewing Reports and Forms
<b>Bulletin Board</b>	Bulletin Board	Using the Bulletin Board
<b>Employee Course Evaluation</b>	Employee Course Evaluation	Managing Course Completions and Evaluations
<b>Manager Course Evaluation</b>	Manager Course Evaluation	Managing Course Completions and Evaluations

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## Module Overview, Continued

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### Navigation List (continued)

Navigation List	Associated Window(s)	Procedure Steps by Topic
<b>SIT Completed/Required Training:</b>		
People	Find Person People	Updating Required Training in HR Retrieving and Updating Completed Training
<b>Civilian Inbox</b>	Notifications Summary	Processing OTA Actions in the Civilian Inbox
<b>Extra Information</b>		
		Special Training Programs

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